

# **TimeCurve IDOA Billing Utility**

## **User Manual**

Version 1.1

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# 1. Overview

## 1. Purpose of IDOA Billing Utility application

IDOA Billing Utility Application (Billing Utility) is a Windows Desktop program used to generate VRFP billing file for the IDOA CCP program. It uses a client list file downloaded from the IDOA eCCP portal and schedules created in TimeCurve Scheduler Online to create the VRFP billing file which can be uploaded into IDOA eCCP web portal.

## 2. Minimum Requirements

Billing Utility can be installed on any Windows PC, including Windows XP, Vista, Windows 7 and Windows 8.

## 3. Overview

Billing Utility is used to generate the VRFP billing file based on schedules created in TimeCurve Scheduler Online. Currently IDOA eCCP web portal requires vendors to enter billing information for the clients that they served manually, resulting in laborious and error prone process. Billing Utility alleviates this by fully automating the process. The VRFP billing file that it generates, is uploaded to IDOA eCCP web portal where it is processed by the IDOA system.

In order for the Billing Utility to work it requires two components:

- List of current clients assigned to the agency (downloaded from IDOA eCCP web portal)
- Schedules for these clients created in TimeCurve Scheduler Online.

The following sections describe the process of generating VRFP file in detail.

## 4. Order of Steps

1. VRFP file is generated based on schedules that exist in TimeCurve Scheduler online. Before first schedule can be created in TimeCurve Scheduler Online, a list of clients, and employees must be added to TimeCurve Scheduler Online. If your agency is using

QuickBooks then clients and employee can be exported from it into TimeCurve Scheduler Online using QuickBooks Utility Application, which can be found on Downloads page of our web site. If your agency does not use QuickBooks, then clients and employees must be entered into TimeCurve Scheduler Online manually.

2. Once the schedules have been created, a client list must be downloaded from IDOA eCCP portal.

3. Finally the Billing Utility application is run to generate the VRFP billing file, based on the clients list downloaded from IDOA eCCP portal and schedules created in TimeCurve Scheduler Online.

## 2. Using Billing Utility Application

### 1. Downloading IDOA Client List File

Billing Utility requires as input a client list, which must be downloaded from the IDOA eCCP web portal. Login to IDOA eCCP portal using your user name and password, then click on Administration->Download Client IDs link in the left panel.

Select date range and make sure to place a check mark for “With CCU contract numbers”.

**In order to get the most complete list, enter the date range that is wide enough to capture all clients that have been assigned to your agency. These dates indicate time when the client has been assigned to your agency.**

Click on Submit button, then click on the Download File link which will be displayed on the screen. Save this file anywhere on your PC.

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Community Care Program Information System

Logout | Home | Help

**CLIENT MASTER REC**  
**CASE MANAGEMENT**  
**PAYMENTS**  
**SUMMARY REPORTS**  
**WAIVER ACTIVITIES**  
**ADMINISTRATION**  
**USER IDS**  
**CLIENT IDS**  
**Download Client IDs**  
**INFORMATION**

**DOWNLOAD CLIENTID DATA FILE**

Enter the field(s) below to download ClientIDs file

**Service Start Date\* (mm/dd/yyyy)**  
01/01/2013

**Service End Date\* (mm/dd/yyyy)**  
12/31/2013

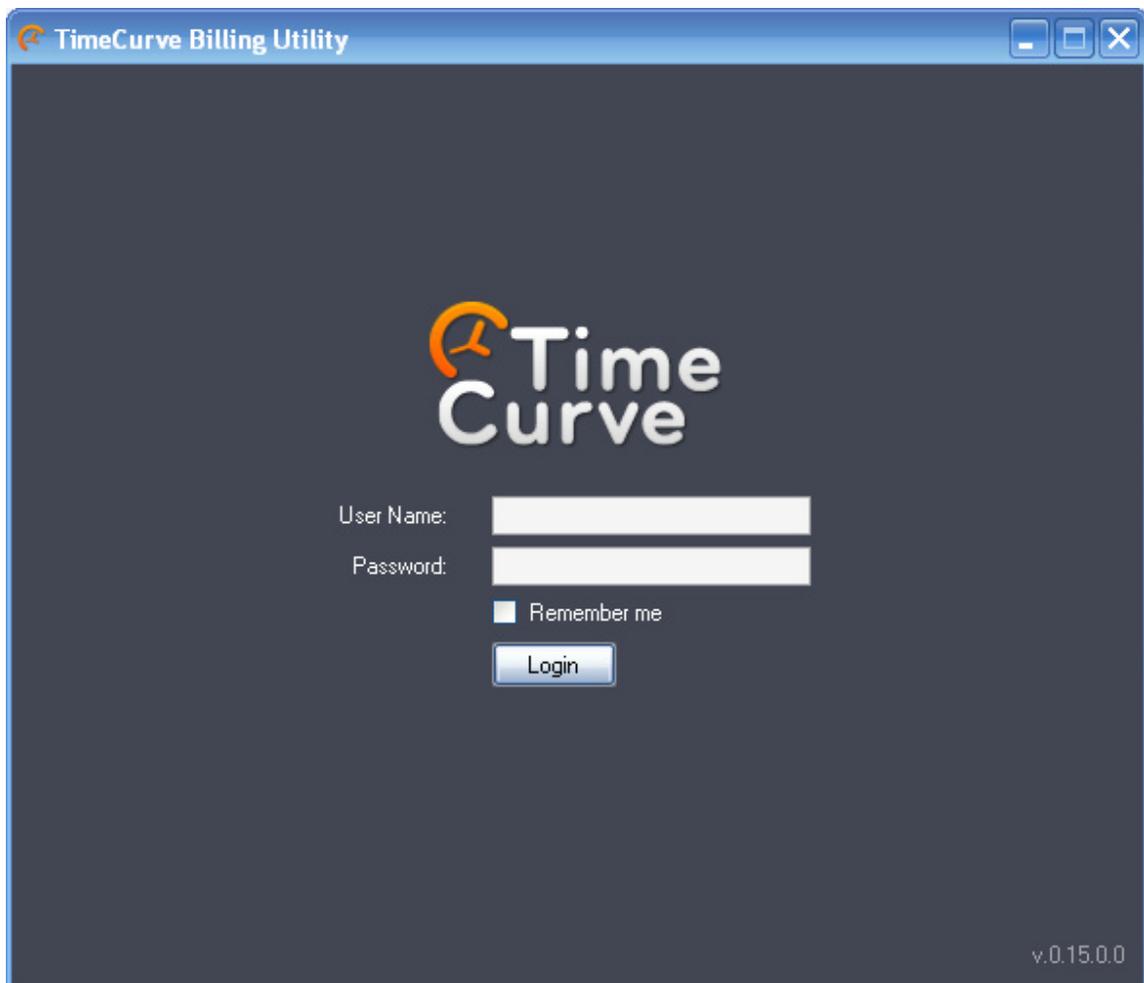
**With CCU contract numbers**

Submit Cancel

\* Denotes required fields

## 2. Billing Utility Login Screen

Billing Utility opens to display a Login Screen. Use your TimeCurve Scheduler Online credentials to login. Please note that you will receive an error if a user with these credentials already logged into TimeCurve online. Any given user can be logged in once either to TimeCurve Scheduler Online or Billing Utility.

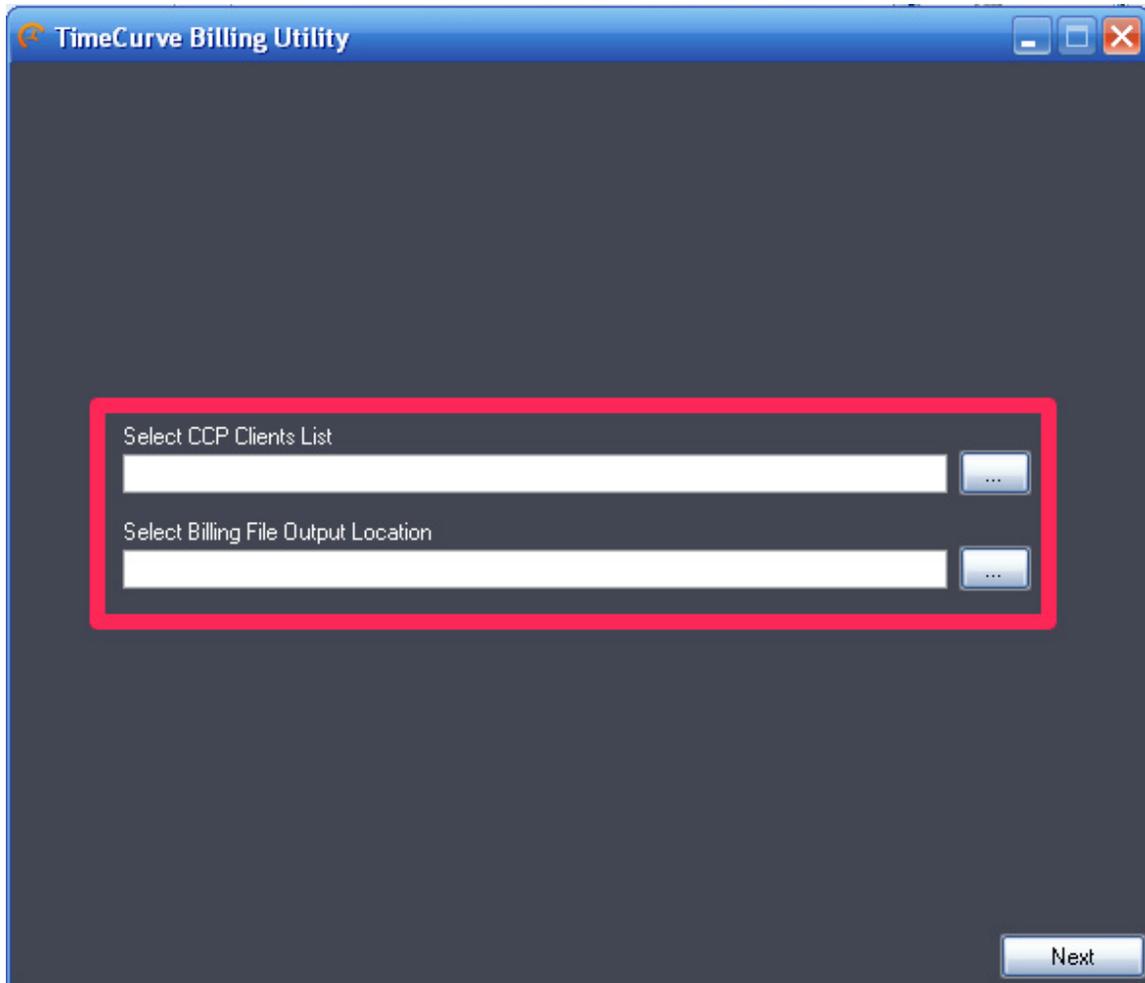


### 3. Setting Options

Upon successful login, Billing Utility will display a screen where you need to set two options:

- Select CCP Client List – click on “...” button and browse to the location where you saved your IDOA CCP Client list downloaded from the eCCP web portal.
- Select Billing File Output Location – click on “...” button to select the name and location for VRFP Billing file that Billing Utility will generate.

When done, click Next to continue.



#### 4. Selecting Date Range and Clients

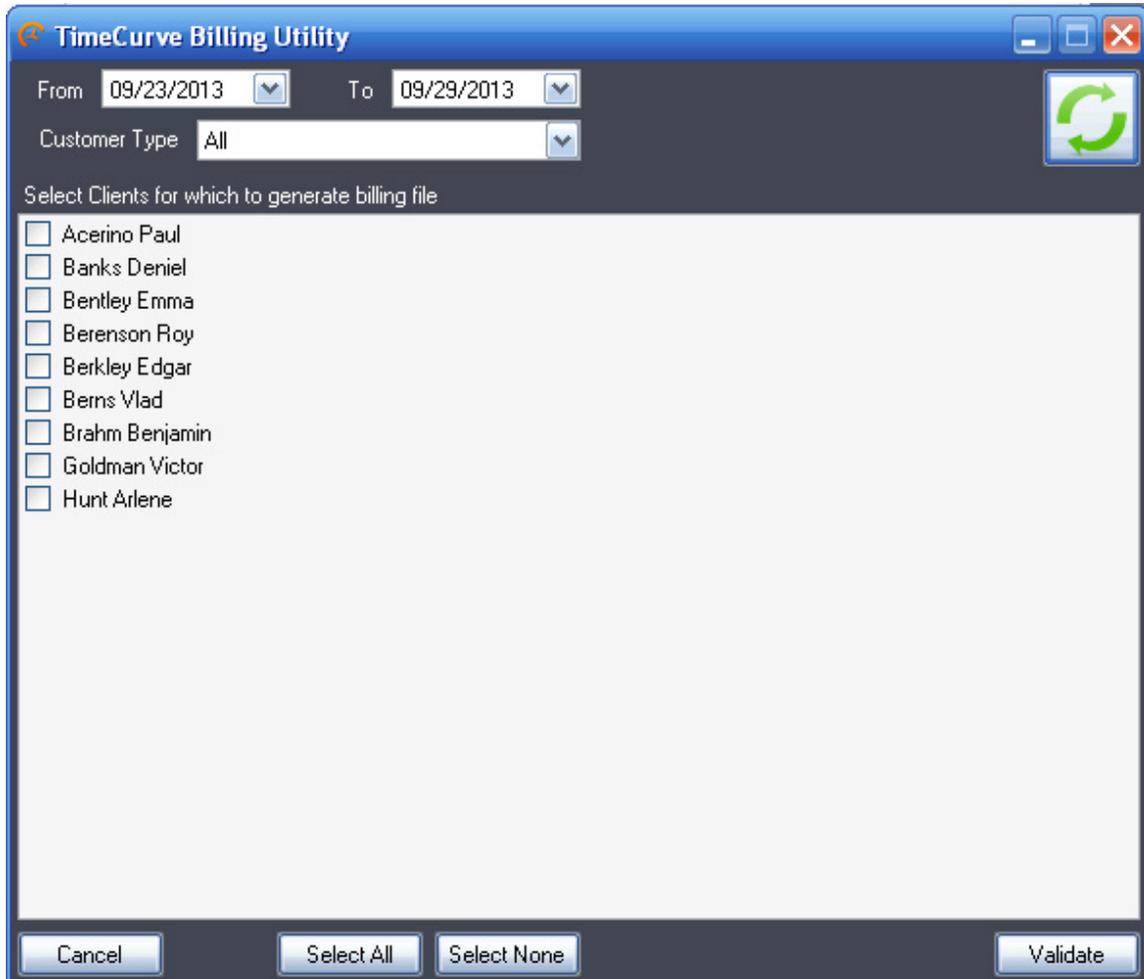
Billing Utility will connect to TimeCurve Scheduler Online to generate the list of clients for which it found schedules for the current week. Once it gathers necessary information it will open a client list screen.

You will have an option of selecting a different date range for which you would like to generate billing file. To refresh the list of clients click on the Refresh button in the upper right corner of the screen.

You can filter the client list by selecting a client type from the drop down list called "Customer Type". Please note that this list will be empty if you do not have any customer types setup in TimeCurve Scheduler Online or imported them from QuickBooks.

The last step is to select one or more clients in the list for which the VRFP Billing file will be generated, by placing a checkbox next to their names. You can select all of the clients in the list by clicking on “Select All” button in the bottom left corner of the screen.

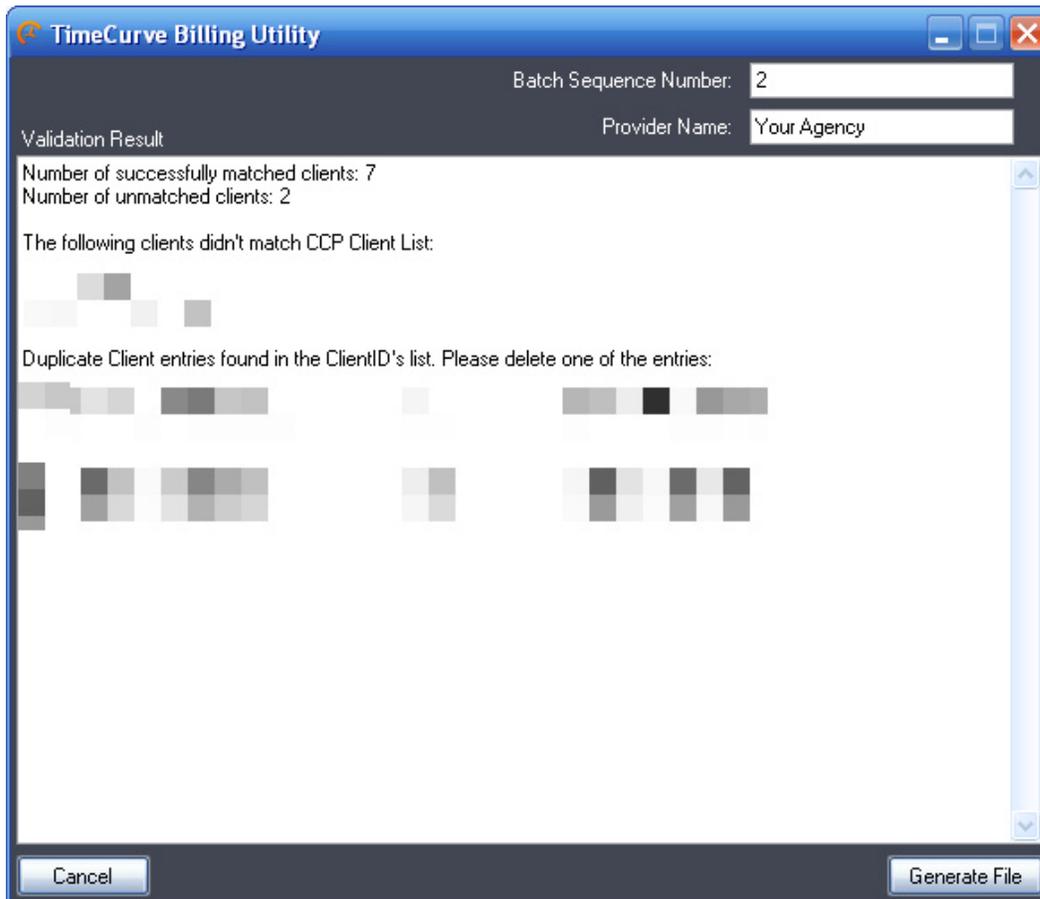
Before generating VRFP Billing file Billing Utility validates all of the data and presents you with validation report so that you can make changes or adjustments if necessary. To start validation process, click on “Validate” button in the bottom right corner.



## 5. Validation Status Report

Upon completion of validation step, Billing Utility will display validation status report screen. The report on this screen will show the number of clients that it has successfully matched between IDOA Client list and clients with schedules in TimeCurve Scheduler

Online. It will also display all clients that it was unable to match. Clients that were not matched either do not exist in IDOA Client list or TimeCurve Scheduler Online or their names could be misspelled. Validation result report will also report duplicate entries if found, in the Client list file which was downloaded from IDOA eCCP web portal.



There are two additional fields in the upper right corner, that must be filled out before proceeding with generating of VRFP file:

- Batch Sequence Number - is a number that identifies the generated VRFP file. This number will increment automatically by one for each generated VRFP file.
- Provider Name - is the name of your agency.

To generate the VRFP billing file, click on Generate File button in the bottom right corner.

## 6. Final Result Report

Once the VRFP billing file has been generated the final status report will be displayed. The status window will display total schedules processed as well as total billed hours. To review generated VRFP file click on Open File button. To access the folder where the VRFP file is stored click on Open Folder button. Finally Open Log file button will open a log file, that contains technical information that may be used by TimeCurve Support engineers to debug problems.

